



MEDICAL DEVICES



PHARMACEUTICALS



CHEMICALS



FOOD & BEVERAGE



ELECTRONICS

Analysis of the Hip Implants Market

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VENTURE PLANNING GROUP 545 Eighth Avenue, Suite 401 New York, NY 10018
Phone + 1 212 564 2838 Fax + 1 212 564 8133 ***info@vpgcorp.com***

F R O S T & S U L L I V A N



Market
Engineering

Analysis of the Hip Implants Market

Advancements in Materials and Design Lead the Way

United States

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Market Overview—Definitions

- This research service evaluates the hip implants segment of the joint implants market in the United States (this study does not include other joint implants).
- Hip implants are devices used in hip replacement surgery. Hip replacement surgeries are also referred to as hip arthroplasty in the industry.
- The hip joint has the design of a ball-and-socket joint: the spherical head of the femur bone moves inside the cup-shaped hollow acetabulum socket of the pelvis. The hip implant mimics this mechanism.
- The hip implant comprises three parts: the stem, the ball, and the cup.
 - The stem fits into the femur with the ball of the implant replacing the femur head.
 - The cup holds the ball in place and facilitates movement.
- To fit different anatomies, hip implants are manufactured in different sizes.
- The time frame covered is from 2008 to 2016, with 2011 as the base year.

Market Overview—Definitions (continued)

- Content includes products on the market, products in development, and procedure, price, and revenue forecasts. Market challenges, drivers, and restraints are identified and assessed.
- Units used in the study:
 - Procedures: This indicates the number of patients who were discharged from U.S. hospitals for procedures involving hip implants.
 - Prices: Represented in U.S. dollars. The price is represented as average selling price (ASP) based on prices of various hip implants listed by respective manufacturers.
 - Revenue: Represented in U.S. dollars. Revenue is a product of the number of procedures for the year and ASP for the respective year.
- Annual revenue for public companies was derived from annual reports. Revenue for private companies was based on primary interviews.

Market Overview—Key Questions This Study Will Answer

Is the market growing, how long will it continue to grow, and at what rate?

What are revenue, procedure and pricing numbers for different segments of the hip implants market?

Who are major players in the market?

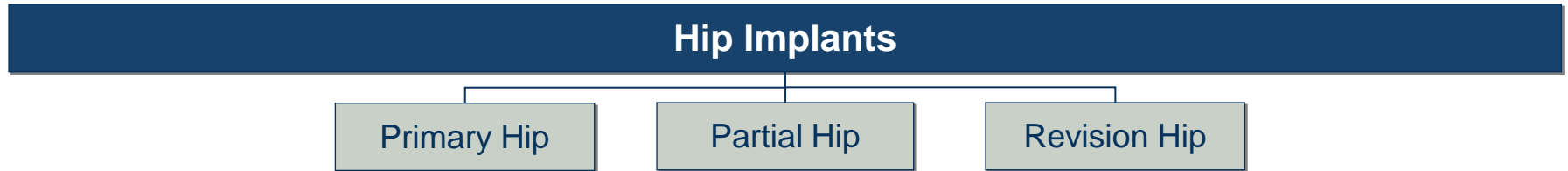
How will the structure of the market change with time? Is it ripe for acquisitions?

Are the products/services offered today meeting customer needs, or is additional development needed?

What are trends in technology in the hip implants market?

Market Overview—Segmentation

Total Hip Implants Market: Market Segmentation, United States, 2011



Market Segmentation

- Primary hip implants are devices that replace a patient's entire hip joint. The primary hip implant includes head, stem, liners, and cups.
- The partial hip replacement procedure, also referred to as partial hip resurfacing, is unlike a total hip replacement in that it leaves more of the patient's bone in place and does not require that the femur neck shaft be removed. During the procedure, usually only the femur head is reshaped and resurfaced with an artificial shell to help reduce pain and ensure joint stability.
- Revision hip replacement surgery is a procedure to replace a worn-out hip implant. Hip replacements wear out slowly, but the problem does progress over the years.
- For the most part, the same pool of companies competes in all three segments.

Market Overview—Segmentation (continued)

Percent Sales Breakdown

Total Hip Implants Market: United States, 2011

